The Estate and Gift Tax Committee of the Taxation Section of the State Bar of California presents

The Eleventh Annual Estate and Gift Tax Conference

PROGRAM REGISTRATION FORM

January 24, 2003 • Los Angeles Omni Hotel, Los Angeles | **January 25, 2003 • Hyatt Embarcadero, San Francisco**

Note: One registrant per form. Photocopies may be used.

Name ______________________________ Bar # __________

Firm ______________________________

Address ______________________________

City, State, Zip Code ______________________________

Phone ______________________________

LOCATION CHOICE

❑ January 24 / LA ❑ January 25 / SF

PROGRAM REGISTRATION FEES

❑ Taxation Section Members . . . . $ 295

❑ Non-Section Members . . . . $ 355
(includes 2003 Tax Section Membership)

FOR GOVERNMENT ATTORNEYS:

❑ Government Attorneys who are Taxation Section Members . . . . $ 195

❑ Government Attorneys (not Taxation Section Members). . . . . $ 255
(includes 2003 Tax Section Membership)

AMOUNT ENCLOSED / TO BE CHARGED . . . . $ _____

DEADLINE Your form and check, payable to The State Bar of California, or credit card information must be received by **January 20, 2003**.

MAIL TO Program Registrations, The State Bar of California, 180 Howard Street, San Francisco, CA 94105. Make checks payable to The State Bar of California.

FAX TO Program Registrations at 415.538.2368. Credit card information is mandatory.

ON-SITE REGISTRATIONS On-site registrations are on a space-available basis only.

QUESTIONS For registration information, please call 415.538.2508. For program content and/or Section information, please call 415.538.2580.

All requests for refunds must be in writing and received by **January 20, 2003**.

SPECIAL ASSISTANCE For special assistance, please call 415.538.2580 or TDD for speech and hearing impaired, please call 415.538.2231.

TAPE & AUDIO If you would like to order an audio cassette and program booklet, please contact Versa-Tape Company at 800.468.2737. Cost for the tape and booklet is $265. MCLE self-study only.

CREDIT CARD INFORMATION (VISA / MASTERCARD ONLY)

I/we authorize the State Bar of California to charge my/our program registration to my/our VISA/MasterCard account. (No other credit card will be accepted.)

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The Eleventh Annual Estate and Gift Tax Conference

LOS ANGELES
Los Angeles Omni Hotel
251 S. Olive Street
(213) 617-3300
Friday, January 24, 2003

SAN FRANCISCO
Hyatt Regency
5 Embarcadero Center
(415) 788-1234
Saturday, January 25, 2003

7.5 Hours including 1 Hour of Ethics
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The State Bar of California
180 Howard Street
San Francisco, CA 94105

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PROGRAM SCHEDULE

8:00a.m.-8:25a.m. — **Registration**

8:25a.m.-8:30a.m. — **Introduction**

8:30a.m.-10:00a.m. — **Current Developments in the Estate and Gift Tax Laws**

Andrew M. Katzenstein
Katten Muchin Zavis, Los Angeles, CA

Andrew Katzenstein presents his complete summary of important developments in case law, rulings and legislation. Don't miss this comprehensive summary of important new planning considerations.

10:15a.m.-11:45a.m. — **Split Dollar is Dead – Long Live Insurance Financing**

Brad Bauer
Northwestern Mutual Life Insurance, Milwaukee, WI

The dinosaur mythology and ideology of split dollar is dismantled, piece by piece, and reason finally rules in this look at what "split dollar" really is, what to do with existing plans, and what to implement before and after split dollar regulations are published in final.

12:00p.m.-1:00p.m. — **Lunch**
Ethical Considerations in Estate Planning
Identifying and dealing with ethical considerations in your estate planning practice.

1:15p.m.-3:15p.m. — **Blending and Managing Valuation Methodology and Entity Legal Issues**

A program discussing the relationship between attorney and appraiser when serving a client in the valuation planning area. Specific discussion will include discussion of recent developments in the Section 2036 area, valuation methodology deficiencies, and operational realities of entities, as well as resent court decisions and IRS rulings.

Owen G. Fiore
The Fiore Law Group LLP, San Jose, CA

Mel H. Abraham
The Accounting Offices of Mel H. Abraham, CPA, CVA. Wood Ranch, CA

3:30p.m.-4:45p.m. — **Charitable Lead Trusts: Top 13 Bogus Objections or How to Move your Clients from Talk to Action**

Robert A. Goldman
Goldman & Associates, San Francisco, CA

From a primer to an advanced course: discussion of charitable lead trusts and how they can improve your clients plan, particularly in light of current interest rates.